


SOAR (SSI/SSDI Outreach, Access, and Recovery) for Adults: Leadership Academy


Substance Abuse and Mental Health Services Administration
(SAMHSA) SOAR Technical Assistance Center
Policy Research Associates, Inc.



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SOAR for Adults: Leadership Academy

Welcome and Agenda Review



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SOAR for Adults: Leadership Academy

SOAR Learning Catalog: An Overview

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SOAR Learning Catalog

- I. SOAR Orientation: An Introduction
- II. SOAR Foundations: The SOAR Online Courses
- III. SOAR Online Course Review Session: Making SOAR Work
- IV. SOARing to Success: Completing your First SSI/SSDI Application
- V. Continuing Education

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SOAR Learning Catalog: Orientation

- SOAR Orientation: An Introduction
 - SOAR 101 for new stakeholders
 - For community members
 - Basic information for those not intending to complete SSI/SSDI applications
 - Different versions for those serving adults and those serving children

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SOAR Learning Catalog: Foundations

- SOAR Online Course
 - For individuals seeking SOAR certification and who intend to assist with SSI/SSDI applications
 - Adult curriculum
 - Child curriculum



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SOAR Online Course Cohort Training Model

TASKS	RESOURCES AVAILABLE
Determine your audience and advertise the training	Sample Training Flyer and Registration Form
Set timeframe and weekly expectations	Sample Cohort Timeline
Track Progress	OLC Trainee Status Reports
Weekly check-ins	Sample Call Agenda and Slides
Follow-up Calls	Sample Call Agendas



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SOAR Online
Course Cohort

Customize the training timeline for your community!

[illegible]

The course and all practice case materials should be



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SOAR Learning Catalog: Review Session

- SOAR Online Course (OLC) Review Session
 - Half-day training for individuals who have successfully completed the SOAR Online Course
 - In-person or virtual options
 - Connect with trainees
 - Review aspects of the curriculum
 - Share your state's SOAR process
 - Introduce participants to local SOAR contacts



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SOAR Learning Catalog: SOARing to Success

- Completing your First SSI/SSDI Application Cohort
 - Designed to assist newly trained SOAR case workers with completing and submitting their first SOAR-assisted SSI/SSDI application.
 - SOAR Local Lead meets with practitioners over four sessions to guide them step-by-step through the process.
 - In-person or virtual
 - Estimated time: 1-2 hours per session



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SOAR Learning Catalog: Continuing Education

- SOAR Electives:
 - Appeals
 - Employment and Work Incentives
 - Online Application Tracking (OAT) Orientation
 - Special Populations
 - SSA Mental Disorder Listings Training
- Webinars
- SOARing Over Lunch



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SOAR for Adults: Leadership Academy
SOAR Orientation: Modeling the Orientation


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**SOAR (SSI/SSDI Outreach, Access, and Recovery)
for Adults Orientation**

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Purpose and Objectives

- Share the importance of Supplemental Security Income (SSI) and Social Security Disability Insurance (SSDI) benefits
 - Including income, health insurance, education and employment supports, and housing stability
- Offer opportunities for community members to get involved with SOAR
 - Connecting to local SOAR efforts, the SOAR Online Course, and the SOAR Online Application Tracking (OAT) program

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What is SOAR?



- A model for assisting eligible individuals to apply for Social Security Administration (SSA) disability benefits
- For individuals who are experiencing or at risk of homelessness and have a serious mental illness, co-occurring substance use disorder, or other physical disabilities
- Sponsored by SAMHSA in collaboration with the Social Security Administration (SSA) since 2005
- All 50 states and Washington, DC currently participate

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SSI and SSDI: The Basics

Supplemental Security Income (SSI)

- Eligibility based on need: low income and resources; living arrangement
- Monthly amount based on Federal Benefit Rate: \$841/month (2022) (2021: \$794)*
- Date of eligibility based on Protective Filing Date/Application Date
- Health insurance: Medicaid

Social Security Disability Insurance (SSDI)

- Eligibility based on insured status (FICA payments)
- Monthly amount based on earnings history
- Date of eligibility based on "date of onset" of disability, 5 month waiting period
- Health insurance: Medicare

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*<https://www.ssa.gov/ssi/text-general-ussi.htm>



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SSI/SSDI Eligibility: Definition of Disability for Adults

SSA's Definition of Disability



Medical Condition(s)

- Diagnosis
- Documentation
- Duration



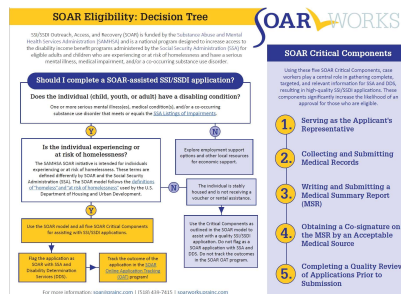
Functional Impairment(s)

- Severity
- Work
- SGA

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SOAR Eligibility: Decision Tree



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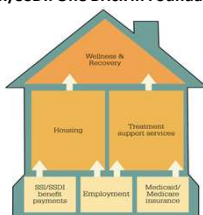
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A Foundation for Recovery and Resiliency

More Than Income

- Access to health care and housing
- Increased education and employment opportunities
- Decrease in incarcerations and hospitalizations

SSI/SSDI: One Brick in Foundation



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How do States and Communities Benefit?

SSI and Medicaid bring federal dollars into states, localities, and community programs:

- Health providers can recoup cost of uncompensated care.
- States and localities can recoup the cost of public assistance.
- Cash benefits and back payments received by individuals is spent in the local community (2021: \$564 million*).

* <https://soarworks.samhsa.gov/article/soar-outcomes-and-impact>

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What Makes SOAR Unique?



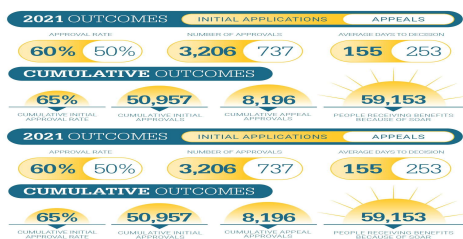
SOAR-trained case workers are the heroes!



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SOAR Works!

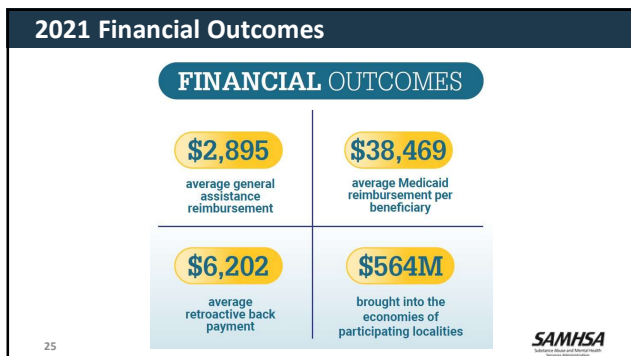


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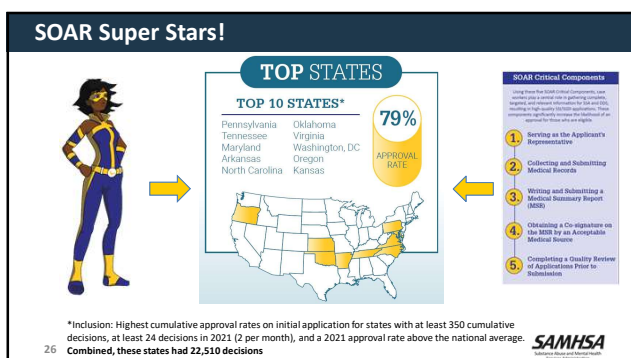
*National SOAR outcomes as of June 30, 2021
<https://soarworks.samhsa.gov/article/soar-outcomes-and-impact>



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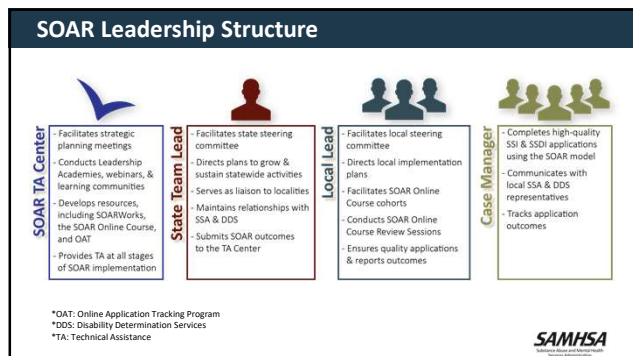
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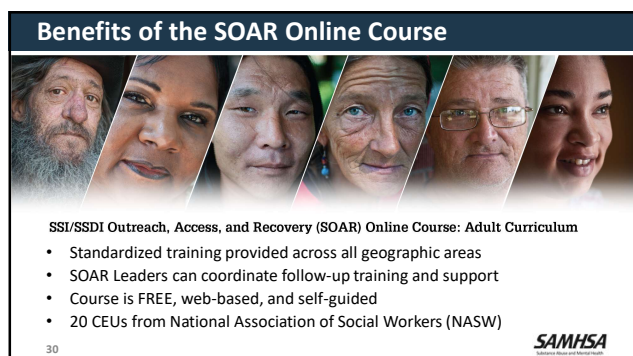
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SOAR Online Course: Articles and Practice Case

Articles and Content

Practice Case

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Getting Involved: Time Commitment

- Training: 20 hours
- 20-40 hours per complete application
- SOAR Critical Components
- Outcome Tracking
- Benefit to Your Agency and the Individuals You Serve

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Online Application Tracking (OAT)

All the reasons
OAT is awesome!

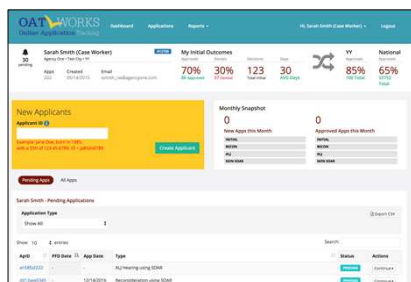
<https://soartrack.samhsa.gov>

- Web based
- User friendly
- HIPAA compliant
- Monitors quality
- Takes only 3-5 minutes
- It's FREE!

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OAT Case Worker Dashboard



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Next Steps

- Learn more about SOAR
- Get in touch with your SAMHSA SOAR TA Center Liaison
- Reach out to your local or state SOAR leads
- Register for the SOAR Online Course

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Additional Resources

- SOAR Works Website and Online Course: <https://soarworks.samhsa.gov/>
- SOAR Outcomes Tracking: <https://soartrack.samhsa.gov/>
- SSA Disability Information: <https://www.ssa.gov/benefits/disability/>
- SSA Employment Supports: <https://choosework.ssa.gov/>

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Thank You

SAMHSA's mission is to reduce the impact of substance abuse and mental illness on America's communities.

<https://soarworks.samhsa.gov>

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www.samhsa.gov

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SOAR for Adults: Leadership Academy
SOARing to Success: Completing Your First SOAR-Assisted SSI/SSDI Application Cohort

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SOARing to Success: Overview and Objectives

- What is SOARing to Success?
 - A guided cohort for completing first SOAR-assisted applications
 - Four 60-90 minute meetings over 60 days
 - Consists of case consultations with emphasis on the SOAR critical components
 - Intended for small groups (5-10 case workers)

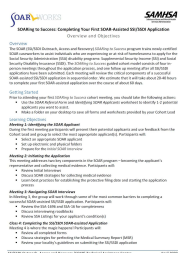
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SOARing to Success: Overview and Objectives

- Identifying the SOAR Applicant
- Initiating the Application
- Navigating the SOAR Interviews
- Completing the SOAR-Assisted SSI/SSDI Application



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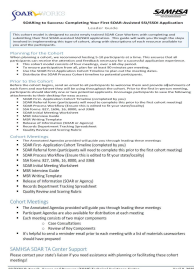
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SOARing to Success: Leader Guide

The Leader Guide Includes:

- Planning for the Cohort
- Cohort Meetings
- Support Available



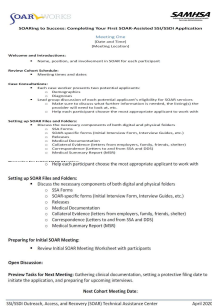
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Annotated Agendas

Agenda and information to review with participants



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SOAR for Adults: Leadership Academy
Supporting High Quality SSI/SSDI Applications

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Successful Outcomes Occur When:

- Persons assisting with applications are SOAR-trained and implement the model
- There is an eligible applicant
-  **SOAR Tool:** *Identifying SOAR Applicants*
- Providers are offered ongoing support
- There is collaboration between SSA, DDS, and the SOAR provider
- Communication between SOAR partners is maintained

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Why Pay Attention To Quality?

- Ensuring quality applications is a SOAR Critical Component
- Increases the likelihood of approval on initial application
- Increases expertise and skills of SOAR case managers
- Identifies challenges that can be resolved by the local SOAR steering committee
- Maintains good relations with SSA and DDS

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How To Spot Quality

- Complete information
- Online form submission
- Medical records indicating impairment
- Detailed functional summary
- MSR co-signed by an Acceptable Medical Source (AMS)
- Timely communication with SSA/DDS



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Tips for Supporting Quality Applications

- Provide ongoing support to benefit specialists
- Review applications before submission
- Develop statewide or local standards
- Offer targeted refresher trainings
- Ask SSA and DDS for feedback
- Use outcomes to monitor quality

Descriptions and examples provided on the following slides!



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1. Provide Ongoing Support to Benefits Specialists

- Set up regular meetings or conference calls with persons assisting with applications in your community
- Celebrate successes and share challenges
- Mentor newly trained providers
- Discuss solutions and identify issues that need to be brought to the local or state SOAR planning group
- Invite SSA or DDS as the need arises
- Invite guest speakers to address common issues



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Virginia SOAR Initiative

- Upon completion of the SOAR Online Course trainees attend a two day/session Virginia SOAR Certification course, where they learn the Virginia SOAR process, and are introduced to their SOAR Local Leads and SSA/DDS contacts.
- Local Leads are available in each area of the state for support; they mentor new trainees and perform quality review.
- The SOAR State Team Lead and Local Leads also regularly review data in OAT and provide an updated list of SOAR-trained case workers to SSA and DDS.

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2. Review Applications Before Submission

- Reviewer/mentor should be experienced with quality applications
- Make sure all expected components are present – SSA forms, medical records, and Medical Summary Report (MSR)
- Review and provide feedback on MSR
- Names, SSNs and birth dates can be redacted or a separate release covering collaborating agencies can be used for this purpose



SOAR Tool: Quality Review Checklist



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Missoula, Montana

- In 2018 Montana implemented a statewide SOAR certification process, the process requires that SOAR-trained case managers complete all SOAR critical components during the application process, track outcomes and actively collaborate with other local SOAR case workers.
- To maintain certification case managers must submit at least two redacted MSRs for review:
 - SOAR-trained case managers send the redacted MSR to a Missoula Local Lead and allow them at least 7 days for review.
 - The Local Lead will review the MSR and send it back with comment and a completed Quality Review Checklist.

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SOAR Tool: Quality Review Checklist



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3. Develop Statewide Standards

- North Carolina Coalition to End Homelessness created a certification program for all case managers that participate in SOAR
- Two stages of certification: Provisional and Certified SOAR Caseworker
- Must submit a total of 6 applications, MSRs, Quality Review Checklists, and outcomes before being certified
- Outcomes: Cumulatively, 76% of 3,112 applications have been approved



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4. Offer Targeted Refresher Trainings

- Bring together newly trained case managers before or just after they start their first application
- Conduct additional training on writing MSRs based on what you are seeing during quality reviews
- Invite SSA to provide training on completing the SSA-8000
- Make trainings an opportunity to listen to case managers about their experiences with SOAR



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South Carolina

- DDS was seeing an increase in denials
- State Team Lead and SAMHSA SOAR TA Center identified a need to improve Medical Summary Reports
- Held a targeted training to review what to include, and the components of a quality MSR



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5. Ask SSA and DDS for Feedback

- General feedback can be provided at monthly steering committee meetings
- Specific feedback can be provided to case workers using an agreed upon feedback form
- Involving SSA and DDS in quality review shows respect for their collaboration and our commitment to submitting complete applications



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Nebraska

- Established a great working relationship between SOAR case managers and DDS
- Survey is attached to each SOAR application to evaluate the SOAR critical components; DDS supervisors provide monthly report of the surveys
- Allows supervisors and case managers to strengthen areas that DDS identifies
- Assists the State Team Lead and SAMHSA SOAR TA Center in providing targeted technical assistance



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6. Use Outcomes to Monitor Quality

- Look for low approval rates
- Look for whether SOAR critical components were used
- Identify areas for improvement
- Target communities, providers or individual case managers for additional training or technical assistance
- Share outcomes regularly with communities
- Reward communities, providers and individual case managers who demonstrate high quality and consistent outcomes



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Using OAT as a Management Tool

- Run reports as a state or local lead to look at:
 - Approval rates
 - Use of SOAR Critical Components
 - Number of applications from each case manager
- Use outcomes to identify opportunities for targeted TA



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Maryland SOAR Symposium

- Held annually since 2014
- Brings together SSA, DDS, SOAR Leads, case managers from across state
- Workshops increase practitioners' skills; share expertise from providers
- Provide recognition of those who pass Maryland's SOAR Certification process
- "SOAR Values in Action" Awards to individuals/partners who demonstrate incredible commitment and dedication to serving others through SOAR



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You Are Not Alone

- Others who can help ensure quality:
 - Individual care coordinator
 - Peers/mentors
 - Provider agency supervisors
 - Local/Regional/State SOAR planning group
 - SOAR Leaders
 - SSA/DDS
 - SAMHSA SOAR TA Center



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Tools To Help

-  **SAMHSA SOAR TA Center Tools**
 - Quality Review Checklist
 - Identifying SOAR Applicants
 - Steps to Completing SSI/SSDI Applications using the SOAR Model
- Your state's SOAR Process – outlines exactly how quality applications should be completed



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Activity

Supporting Quality

- Each table has 5-7 minutes to brainstorm ideas to address the scenario you have been given
- Select a recorder and someone to report back on your group's proposed resolution

Scenario #1 Supporting Quality Applications

- You are seeing a lot of denials. Your case managers are getting discouraged.
- You wonder if it is a problem with doing applications for people who are likely not eligible or is it the quality and completeness of the applications themselves?
- How can you get a better handle on what is going on?



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Scenario #1

- You are seeing a lot of denials. Your case managers are getting discouraged.
- You wonder if it is a problem with doing applications for people who are likely not eligible or is it the quality and completeness of the applications themselves?
- How can you get a better handle on what is going on?



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Scenario #2

- You discover that some providers are doing applications for anyone who is referred or who asks for assistance. Sometimes the person doesn't meet the eligibility criteria.
- This problem is diverting scarce resources from people who really need assistance and who you think are likely eligible.
- What do you do?

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Scenario #3

- Relations with SSA are good, but the DDS in your state refuses to accept medical records from a third party.
- If you tell case managers not to collect the records because DDS will duplicate their work, they will not have the information they need for their Medical Summary Report and they won't be sure that the right information is getting to DDS.
- How can you resolve this situation so that application quality AND relations with DDS are maintained?

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Scenario #4

- Tell us how you would collect and use outcomes of applications submitted to SSA to identify and address potential problems with the quality and completeness of applications.
- Be specific! You need to minimize the burden on case managers as well as your steering committee, but you want to maximize the number of approvals.

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Scenario #5

- You have four agencies working on SOAR applications in your community.
- One agency's case managers haven't started an application even though they were trained three months ago. Another has done 3 applications and they've all been denied. A third agency has had two approvals. You haven't heard anything from the fourth agency.
- What can you do to improve this situation?

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Scenario #6

- Your community's approval rate on initial applications has gone from 47% to 78%
- You've done your homework and it is paying off. What did you do to turn this situation around?
- What new or additional things might you do to sustain and continue this positive trend?

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You CAN Do This!

- Quality applications mean fewer denials, faster processing times and better relationships with SSA and DDS
- Fast approvals help to quickly improve the lives of the people we serve
- This is why we do this work!

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SOAR for Adults: Leadership Academy
Funding and Sustainability: Making SOAR Work in
Your State or Community

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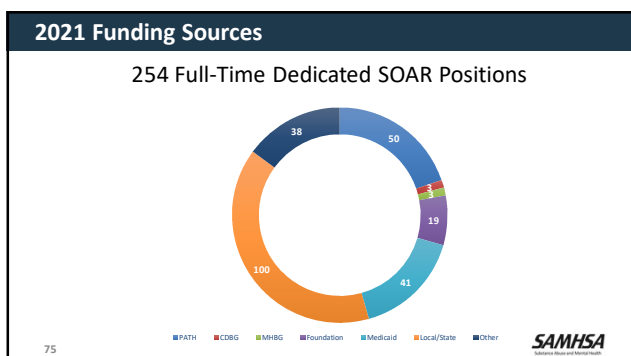
Funding SOAR Programs

- All 50 states participate in SOAR by:
 - Reallocating existing resources
 - Securing funding through federal and state grants and foundation funding
 - Establishing collaborations with hospitals and criminal justice settings

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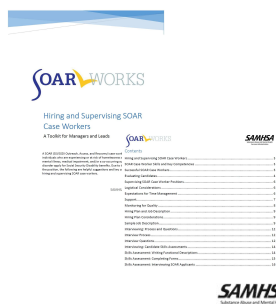
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Hiring and Supervising SOAR Caseworkers: Toolkit

- Recruiting for highly skilled positions
- Interviewing for DEI experience
- Ensuring pay equity
- Supervising SOAR case worker positions



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Pay Equity: Considerations for Funding Requests

- Completing SOAR applications is a specialized skill and the most successful SOAR programs ensure case workers are paid accordingly.
- The benefit of equitable salaries go beyond the individual case worker.
- Fair compensation → staff retention → sustainability of SOAR work.



Example: Jericho Project in New York City considers SOAR a specialized skill and provides a higher salary for the case worker that holds that position.

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Create a Funding Framework

- Know your "ask"
- Explore potential resources
- Create a funding action plan
 - Who, what, when, how
 - Record and revisit responses
- Create and cultivate the necessary partnerships and collaborations
 - Foundation funding networks
 - Advocacy coalitions
 - State Non-Profit Associations

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SOAR Sustainability Self-Assessment and Funding Plan Template

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Marketing Your SOAR Program

<https://soarworks.samhsa.gov/article/soar-marketing-strategies>

- Make the community knowledgeable about your great work
 - General community, providers, potential funders, potential applicants
- Branch out
 - Social media (Facebook, Twitter)
 - E-Newsletter
 - Op-Eds in the local newspaper
- Tips for connecting
 - Keep it simple!
 - Share personal success stories
 - Show how SOAR is a win-win to everyone in your community!



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Federal Funding: SAMHSA

- Projects for Assistance in Transition from Homelessness (PATH)
- Community Mental Health Services Block Grant (MHBG)
- Cooperative Agreements to Benefit Homeless Individuals (CABHI)
- Grants for the Benefit of Homeless Individuals (GBHI)
- Treatment for Individuals Experiencing Homelessness (TIEH)

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Federal Funding: HUD

- Community Development Block Grant (CDBG)
 - A flexible program that provides communities with resources to address unique community development needs
 - Distributes annual grants on a formula basis to local governments and states
 - SOAR programs have used these funds to support dedicated benefits specialists

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Federal Funding: VA/SSVF

- Updated VA and SOAR Memo; reaffirms the importance of using the SOAR model and assisting eligible Veterans with SSI/SSDI applications
 - VA staff can now act as the Veterans' Appointed Representative
- SOAR Works to End Veteran Homelessness: VA Caseworker's Guide
- SSVF and SOAR Integration Toolkit
 - Key strategies for integrating the SOAR model into community planning efforts
 - Approaches for assessing and prioritizing Veterans for SOAR assistance
 - Methods of supporting dedicated SOAR Benefits Specialists within the SSVF grant and working with community partners

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Federal Funding: AmeriCorps

- AmeriCorps State
 - Provide direct outreach, engagement, and assistance with SSI/SSDI applications
 - A cash or in-kind match is required for program costs
 - Apply for a grant through your governor-appointed State Service Commission
 - www.nationalservice.gov

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Federal Funding: AmeriCorps VISTA

- AmeriCorps VISTA
 - Can identify potential SOAR collaborations, organize local SOAR planning meetings, fundraise for dedicated SOAR staff, collect data, and coordinate future trainings
 - Apply through your state Corporation for National and Community Service office
 - No required funding match from sponsors, but there is a cost-share option

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SAMHSA SOAR TA Center Issue Brief on AmeriCorps



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Medicaid and State Health Programs

- Medicaid is a state-operated program, federal and state share the cost
 - State creates a plan for what services are billable
- Case management services necessary for SOAR applications may be billable or allowable services
 - Arizona: SOAR Billing Code in Medicaid State Plan
 - Tennessee: Behavioral Health Safety Net providers can bill for SOAR application assistance
 - Georgia: 9 regional positions statewide for Medicaid Eligibility Specialists

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Leveraging Funds: Medicaid Reimbursement

- Retroactive billing
- Reimbursement for previously uncompensated care
- Payment for ongoing treatment
- In 2021, providers received an average of **\$38,469** in Medicaid reimbursements per person



SAMHSA SOAR TA Center Issue Brief on Hospital Collaborations

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Successful Models: Michigan

- Community identified need and approached hospital charities coordinator
- Hospital was writing off \$140,000/month in bad debt
- Hospital funds one FT SOAR case manager
- 88 percent of 45 applications approved in an average of 76 days
- In 2014, Mercy Hospital was reimbursed \$745,967
- Trinity Health hired 3 more dedicated positions in 2016

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State or County General Assistance (GA)

- GA funds offer time-limited cash benefits to adults without dependents who have limited or no income
 - These benefits are not available in every state
- Through an Interim Assistance Reimbursement (IAR) agreement, SSA can reimburse state or local public assistance funds when individuals begin receiving SSI
 - In 2021, states reported average reimbursements of **\$2,895 per person**

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Successful Models: Minnesota

- Department of Human Services (DHS) administers the GA program
- Up to 35% of GA recovery under interim assistance provisions can be retained by DHS to provide “advocacy, support and claim processing services”
- DHS contracts for Social Security Advocacy Services (the SOAR model can be used for advocacy)
 - State pays \$1650 for an approval on an initial application or a reconsideration appeal

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State or County Temporary Assistance for Needy Families (TANF)

- TANF is a block grant from the Department of Health and Human Services
- Provides time-limited assistance to families with dependent children to help them become self-sufficient through employment
- For parents who can not meet the TANF work requirements, SSI/SSDI may meet their needs and save state funds

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Successful Models: Philadelphia, PA

- Homeless Advocacy Project (HAP) partners with the Philadelphia Department of Behavioral Health and Intellectual Disability Services (DBHIDS)
 - DBHIDS case managers refer their participants who suffer from serious mental illness to HAP; they help to gather evidence and accompany applicants to appointments
- HAP also partners with the Philadelphia Department of Human Services (DHS), Office of Homeless Services (OHS) and Philadelphia's Specialty Criminal Courts
- HAP's in house operation include seven attorneys, two paralegals and pro-bono attorneys that support each other. These seasoned attorneys and paralegals will review applications for quality prior to submission
- Approval rate on initial applications is 94% on 214 applications in an average of 70 days (2021)
 - Overall Pennsylvania Outcomes: 90% for 3,637 applications. In 2021, they averaged 100 days to decision.

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State/Local Plans to End Homelessness

- Most plans to end homelessness incorporate increasing access to mainstream benefits
- Can fund SOAR leadership, coordination, and dedicated benefits specialists
- Find your local plan and promote how SOAR helps meet this goal
- Nashville, TN: 10-year plan funds 3 positions in community mental health center
 - From May 2006-July 2021 SOAR providers in Nashville achieved a 95% approval rate on 1,603 applications, in an average of 52 days.

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Foundation and Other Private Funding

- United Way: funds coordination of SOAR in Trenton, New Jersey; and staffing of SOAR programs in other localities
- Pharmaceutical and insurance companies: GlaxoSmithKline, Blue Cross Blue Shield, and Kaiser Permanente fund SOAR programs in North Carolina and Oregon
- Foundation Center: www.foundationcenter.org
 - Customized reports available from the SAMHSA SOAR TA Center

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Successful Models: North Carolina

- Combined funding streams from: foundations, hospitals, local, state, and federal
- Focus on helping localities develop and sustain benefits specialist positions
- 31 FTEs and 8 PTEs or Volunteer in 18 counties
- 3,112 applications, 76% approval rate, in 2021

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Collaborations with Corrections

- Diversion courts, in-reach initiatives, reentry planning, and SOAR trained corrections staff
- Reduces recidivism, prevents incarceration, saves money

Miami / Dade Jail Diversion Program

- 89 percent of 680 applications approved in average of 45 days
- Housing and treatment provided upon release based on likelihood of SSI approval
- Recidivism dropped from 70 to 22 percent comparing the year before and after SSI approval; demonstrated \$7 million in savings to the State of Florida

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Collaborations with Corrections



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Other Partnerships

- Programs serving targeted groups
 - Veterans
 - Youth leaving foster care
- Local colleges and universities
 - Social work field placements or internships
 - Students get experience working with clients and help grow an agency's SOAR program
- Peer support organizations
 - SAMHSA SOAR TA Center issue brief on utilizing peer support workers with SOAR

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Integrating SOAR with Peer Certification

- SOAR trained peer workers can play a vital role in increasing agency capacity to serve more applicants, provide support to existing SOAR trained staff, and improve quality of applications.
- The requirements for certifying peer support specialists vary by state, and certification bodies range from state government entities to independent non-profit organizations.
- Collaborating with Peer Certification Boards to integrate SOAR within the Peer Certification Process is a viable strategy for supporting SOAR work in your community!

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SOAR & Peer Certifications – Know your Ask!

The Ask	Action Steps
I would like to have peer specialists trained to complete SOAR-assisted SSI/SSDI applications.	<ol style="list-style-type: none"> 1. Create or identify a peer position that can re-allocate job duties for SOAR. 2. Consider revising job announcements to encourage more individuals with lived experience to apply. (Example: "persons with lived experience of mental health challenges or use of entitlements strongly encouraged to apply.") 3. Have peers complete the SOAR Online Course.
I would like peer workers to support existing SOAR-trained staff.	<ol style="list-style-type: none"> 1. Get in touch with SOAR-trained agencies (via State Team Lead or Local Lead) to hold SOAR Orientation presentations. 2. Review existing peer job descriptions to clearly define what support role they will play in the SSI/SSDI application process. Organizations will need to be mindful of avoiding "role drift" where in peer support staff become responsible for duties outside of their scope of practice. 3. Provide outreach materials to peer workers.
I would like peers to take the SOAR Online Course as part of their core education requirements and/or receive Continuing Education credits.	<ol style="list-style-type: none"> 1. Review state-specific requirements for peer certification/continuing education. 2. Contact state certifying body and/or peer training provider/vendor to set up a SOAR Orientation presentation and discuss how SOAR work benefits the peer provider.

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Growing and Sustaining SOAR

- Be creative
- Use your outcomes
- Share success stories with the press
- Give presentations to potential funders
- Create linkage with influential leaders—both private and public
- Keep persisting!

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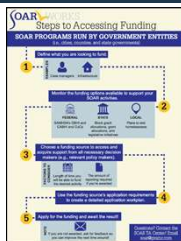
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Funding Resources

- SOAR Cost Savings/Benefit Calculation Guide
- Sample Proposals and Budgets
- External resources and trainings

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<https://soarworks.samhsa.gov/article/funding-and-sustainability-tools>

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Activity

Funding and Sustainability Self Assessment

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Building Your Future

SOAR Sustainability Self Assessment and Funding Plan Template

The SOAR Sustainability Self Assessment is a tool designed to help you assess and plan for the future of your SOAR program. It is a tool that you can use to assess and plan for the future of your SOAR program. It is a tool that you can use to assess and plan for the future of your SOAR program. It is a tool that you can use to assess and plan for the future of your SOAR program.

Section 1: General Information

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2. **Section 2: Funding and Sustainability**

3. **Section 3: Funding and Sustainability**

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Wishes and Wows

What wowed you?
What would you like to know more about?



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SOAR for Adults: Leadership Academy

Welcome to Day 2!

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SOAR for Adults: Leadership Academy

SOAR and Appeals

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SSA Appeals Process

1. Initial determination
2. Reconsideration
3. Administrative Hearing
4. Appeals Council Review
5. Federal Court Review

**Issue Brief: Effective SOAR Representation for Social Security Appeals*



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Appeals Outcomes

- The SOAR process can assist with appeals!
- SOAR has successfully assisted **8,065** persons experiencing or at risk of homelessness through the appeals process.
- **50%** approval rate, in an average of 253 days in 2021
 - Reconsiderations had a 37% approval rate. (SSA national average is 13%)
 - ALJ Hearings had a 67% approval rate! (SSA national average is 45%)
- Compared to the average national processing time of 330 days!

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Appeals Considerations To Think About

- How is your state/local SOAR program handling SSA appeals?
 - In-house representation?
 - Soft hand off to another representative, e.g.) Legal Aid Attorney or Paralegal, Private Attorney?
 - Withdraw current application to file new SSA application?
 - Unsure at the moment

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ALJ Appeals Backlog: Why?

- 418,313 ALJ hearing requests waiting to be scheduled as of 6/30/21
- Currently an average of 330 days wait time for a hearing
 - Varies state to state, hearing office to hearing office
- SSA increasing resources to deal with ALJ and AC backlogs:
 - Modernizing electronic services, e.g.) non-attorney access to Appointment of Representative Services (ARS) at recon and ALJ levels, file appeal request online and upload SSA-1696
 - Hiring more ALJs, Senior Attorney Advisors, decision writers and support staff
 - Prehearing Case Reviews
 - DDS remands
 - COVID pandemic related innovations, e.g.) Virtual Hearings via MS Teams allows for more hearings to be scheduled

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Know the Reason(s) for Denial

- Request the electronic folder (CD) from SSA or the Office of Hearings Operations (OHO)
- Review the CD to ascertain evidence on file and rationale for denial
- Make note of errors, omissions and plan your strategy

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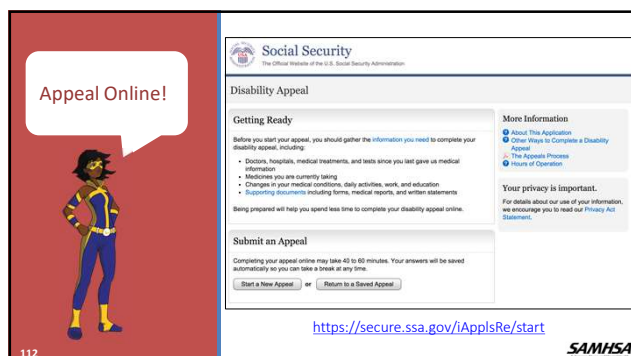
Appointed Representative Services

- Online access to SOAR applicants' electronic folders or eFolders (EFs) is now available for Appointed Representatives with ALJ hearing and Appeals Council level cases
 - View all documents in real-time
 - eFolder access provides uploading and downloading capabilities
- How to enroll:
<https://soarworks.samhsa.gov/article/appointed-representative-services>

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iAppeals

- Online submission allows you to complete and submit, simultaneously:
 - Request for Reconsideration (i561) or Request for Hearing by ALJ (i501)
 - Disability Report - Appeal (i3441)
 - SSA-1696
 - Medical authorization, medical records, school records, and other supporting documents
- SSA online services for appeals now includes appealing non-medical denials (e.g. overpayments, income, resources, insured status, etc.)

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Reconsideration

- First level of appeal in all states!
- Must be filed within 60 days of the date of the receipt of the initial denial notice.
- Three forms to file:
 - SSA-561: Request for Reconsideration
 - SSA-3441: Disability Report- Appeal
 - SSA-827: Authorization to Disclose Information to SSA
- The applicant may submit additional medical evidence and records
- DDS takes a new look at the case and makes a "recon determination"
 - New disability examiner/analyst and reviewing physician

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Administrative Law Judge (ALJ) Hearing

- Second level of Appeal if denied at Reconsideration
- You do not need to be an attorney!
- File within 60 days of decision; submit new evidence if applicable
- Three forms to file:
 - SSA-501: Request for Hearing by Administrative Law Judge
 - SSA-3441: Disability Report- Appeal
 - SSA-827: Authorization to Disclose Information to SSA
- It takes, on average, one year or more for the hearing to be scheduled with OHO
- You can submit a request for an expedited hearing due to dire need

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Appeal vs. New Application

- Starting a new application results in:
 - The loss of the earlier protective filing date and potential loss of months of back benefits
- Requesting reconsideration:
 - Preserves the protective filing date and potential eligibility for months of back benefits
- Be sure the applicant, knows the difference and is making an informed choice!

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What To Do If the Deadline Has Passed?

- The applicant can still appeal if there is "Good Cause" for missing the deadline
- Accepted "good causes" for late filing:
 - Related to applicant's disability
 - Limited English proficiency and/or education
 - Failure to understand the requirements
 - Failure to receive denial notice within 5 days of the date on the notice
 - Unusual or unavoidable circumstances such as hospitalization

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SOAR Tool: Sample Good Cause Letter



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On the Record (OTR) Review

- A written request asking that the ALJ to make a favorable decision based on the evidence in the applicant's case record
- You are requesting a decision based on new evidence that has become available since the DDS denial
- Can be requested by the claimant or SOAR representative, but is often done through a screening process by the OHO Attorney Advisors in an effort to clear hearing backlogs

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Prehearing Case Reviews and Remands

The ALJ can send back to DDS for a pre-hearing case review only when:

- Additional evidence is submitted
- There is a change in law or regulations
- There is an error in the file
- Some other indication that the prior determination may be revised
- Prehearing case reviews cannot delay the hearing
 - If a decision is not made prior scheduling hearing, DDS returns case to ALJ unless all parties consent to delay
- You can help with an ALJ remand by sending in additional medical evidence with hearing request.
- SSA updated their provisions on remanding back to DDS, possibly as a way to reduce hearing backlog.

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Referring Denials to Legal Services

- After applicant makes an informed decision to continue appeal to ALJ or AC levels, you may refer applicant to the following places for legal help in your community:
 - Legal Aid
 - Private attorney, e.g.) Pro-Bono obligation
 - County Bar Association
 - Law School Legal Clinics

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Appeals Resources

- Submitting Appeals Using SOAR: Tools & Resource Packet
- Tips for Pending Applications & Appeals
- Reviewing Denial Notices and the Electronic File
- Filing Online with iAppeals
- Appointed Representative Services (ARS)
- Opening an Encrypted SSA CD-ROM
- Continuing Disability Review (CDR) FAQs
- ALJ Hearings: On the Record
- <https://soarworks.samhsa.gov/topics/appeals>

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SOAR for Adults: Leadership Academy

Encouraging Employment

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Employment Facts!

- People with serious mental illness (SMI) are employed at much lower rates than the general population (approximately 1 in 10)
- Systems have long operated under the incorrect assumption that people with SMI can't work, but studies have consistently found this to be untrue
- Two-thirds want to work and many have worked before
- People with disabling conditions are capable of working if they receive adequate supports

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Working for More than Income

- Self-worth and self-confidence
- Define a role for the person in the community
- Foster a connection to others
- Add structure to daily life
- Critical step in recovery

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Using SOAR as a Myth-buster

Myths	Facts!
If you work, your SSI/SSDI application will be automatically denied	Nope! Applicants can work and earn up to \$1,350/month (2022) (2021: \$1,310) and still be eligible
Benefits and health insurance end immediately when you start working	No way! SSA has amazing work incentives to help applicants keep cash and health benefits
You can only work part-time while receiving disability	No sir-ee! There is no limit to the amount of hours you can work and receive disability
If Social Security knows you are working, they will say you aren't disabled anymore	Nay! SSA suspends Continuing Disability Reviews while beneficiaries use Ticket to Work and make progress towards employment goals

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Start Talking about Work

- Begin the conversations early and have them often
- Remind the individual that it is their decision, let him/her weigh pros and cons
- Provide reassuring and encouraging messages
- Ensure the applicant is equipped with accurate information about working while applying for and receiving SSI/SSDI

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Benefits planning is essential!



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SOAR Employment Conversation Guide

Employment Conversation Guide: Sample Responses

Purpose of the Guide

- To engage conversations about work with SOAR trainees and those supporting the benefits.
- To ensure that the individual is hearing accurate information about employment and returning to work.
- To engage with an individual and determine their work goals.

EMPLOYMENT CONVERSATION GUIDE

Questions to Ask	Response	SOAR Manager Response
What's your goal for work?	I'm only SOAR have never worked, ever.	That's often the case when we are working with people like you. It's possible that you are experiencing work now. You can add in extra money to supplement your benefits and cover things like rent, food, and transportation. We can help you find a job that fits your needs. https://www.samhsa.gov/mental-illness/medication
How long have you been out of work?	I got laid off from my job and then, under the table work.	That's great! Are there types of day work you like more than others? Part-time? Full-time? Do you have to do more of that type of work, if it was ideal?

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Employment Conversation: Sample Responses

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Yes, You Can Work!

- SOAR resource designed to bust myths and promote employment
- One-page fact sheet to share with program participants



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While Applying for SSI/SSDI

You can work during the application process

Strategy: Encourage work from the start

Exploring work while applying for SSI/SSDI:

- Earn up to \$1,350/month (2022) (2021: \$1,310)
- Can help strengthen the application
- SSA may request that applicant submit SSA-821 Work Activity Report when there is evidence of work activity after alleged onset date
- Information from employers is helpful in documenting accommodations that are provided or limitations in functioning

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After Approval for SSI

You can work while receiving SSI

Strategy: Connect with work support programs

- SSA's Ticket to Work
 - <https://choosework.ssa.gov>
- Employment and Job Training Programs
 - Individual Placement and Support (IPS)
 - Vocational Rehabilitation

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What Happens to Cash Benefits?

\$\$ Work Pays \$\$

Supplemental Security Income (SSI)

- Income Exclusion
- Plan to Achieve Self-Support (PASS)

Social Security Disability Insurance (SSDI)

- Trial Work Period
- Extended Period of Eligibility

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Income Exclusion

- Certain amounts of earnings are excluded when calculating countable income
- General exclusion: \$20
- Earned income exclusion: \$65
 - If SSI is sole income both exclusions apply
- After exclusions, SSA Counts \$1.00 for every \$2.00 earned

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Calculating Countable Income

<u>Gross</u> Earnings From Work: \$1,765	
General Exclusion: (\$20)	
Earned Income Exclusion: (\$65)	
= \$1,680	
\$1 Counted for Every \$2 Earned: \$1,680/2	
Countable Income: = \$840	
Maximum SSI check – Countable Income: \$841* -840	
Amount of SSI Check: \$1	
Total Income: \$1,766	

*Calculations use the
2022 Federal Benefit
Rate for SSI of
\$841/month

\$1,766 > \$841

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Plan to Achieve Self-Support (PASS): SSI Only

- Allows an SSI recipient to save money for an educational or vocational goal in a separate account, which is not counted as a resource or countable income when determining his/her SSI payment
- The PASS must be written and approved by SSA, and the goal must be reasonable to attain in three years.
- Example: Joe works part-time as a line cook in a restaurant would like to attend culinary school to get a job as a chef at a local hotel. The tuition for culinary school is \$3,000.
 - With an approved PASS, savings to pay this tuition would not be counted as a resource and would not eliminate his SSI eligibility.

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Trial Work Period (TWP): SSDI Only

- 9 months of gross earnings (per current SSA threshold rate for a TWP month)
- Need not be consecutive
- Are counted within a 5-year period
- Triggers a review of one's continued eligibility for SSDI
- Continue to receive full benefit check during this time



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Trial Work Period Example: SSDI

It only counts as a TWP month when earnings are above the threshold set each year by SSA

2022 = \$970 2021 = \$940 2020 = \$910 2019 = \$880

Month	Earnings	TWP?
Jan 2019	\$850	Yes-1
Feb 2019	\$550	No
Mar 2019	\$970	Yes-2
April 2019	\$600	No
Aug 2019	\$960	Yes-3
Sept 2019	\$970	Yes-4
Oct 2019	\$1,000	Yes-5
Nov 2019	\$950	Yes-6

Month	Earnings	TWP
Jan 2020	\$940	Yes-7
Jun 2020	\$500	No
Jul 2020	\$500	No
Aug 2020	\$800	No
Sep 2020	\$500	No
Jan 2021	\$800	No
Feb 2021	\$950	Yes-8
March 2021	\$1000	Yes-9



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When the Trial Work Period Ends

- SSA will look at earnings in the first month after the Trial Work Period to determine if the person is earning SGA
- Countable earnings can be reduced with a Subsidy and/or IRWEs
- If earning SGA: Benefits cease after a 3 month grace period
- If not earning SGA: Benefits continue



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Extended Period of Eligibility (EPE): SSDI Only

- Applies only to SSDI
- Lasts 36 months from the end of the TWP (if applicable)
- Applies to any month in which earnings fall below SGA
- Allows beneficiaries to receive SSDI in the months of non-SGA earnings during the EPE



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Expedited Reinstatement of Benefits (EXR)

- Five years after benefits cease due to earnings
- Expedited return to payments and medical benefits
- A medical review is done to see if the current condition is the same as, or related to, the original condition
- Applicants can receive six months of provisional SSA benefits while the decision is processed
- Applicants should request EXR from the local SSA office

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Health Insurance

- SSI: Medicaid
 - May continue under Federal Rule 1619B even if SSI cash payments stop
 - Earnings must remain below state threshold
- SSDI: Medicare
 - Continues for 93 months (7.75 years) after the last month of the Trial Work Period
 - May be purchased after 93 months under certain conditions; premium costs for Part A then apply

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VA Income and Benefits Calculator

- Designed to serve Veterans, but useful for non-Veterans
- Intended to provide an estimate of how employment and work incentives affect the SSI cash benefit and overall income
- Easy to use, visual representation that helps to bust myths about employment and disability benefits

<https://soarworks.samhsa.gov/article/income-benefits-calculator>



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Things to Remember

- Employment is possible! Help bust myths!
- Track and report all earnings to SSA
- Don't risk overpayment
- When in doubt, talk to your local SSA field office
- Use your resources!

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Columbus House: New Haven, CT

- The Pathways to Independence (PTI) Program
 - Using holistic, recovery-based incentives to support individuals to engage in employment and maximize income
 - Targeted services for individuals experiencing homelessness and a disabling condition
- Employment and Enrichment Center
- WORKFARE training program
- Employment Network under SSA's Ticket to Work

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Central City Concern: Portland, OR

- Benefit Entitlement Specialist Team (BEST) (SOAR-trained benefits specialists)
- Employment Access Center
 - Career center with 19 computers, phones, resume paper, etc.
 - 16 employment specialists providing individualized support to 876 members
 - 532 individuals (60%) employed through 459 employers; average hourly wage of \$10.43
- IPS Model of Supported Employment
- Encourages working while waiting for benefits

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CABHI: SOAR and IPS Pilot

- Learning community and yearlong pilot (March 2016 to May 2017) for 12 state teams who received the CABHI-States Enhancement grant
 - AZ, CO, CT, IL, MA, MI, MS, NV, OH, TN, UT, WI
- The goal of the pilot was to amend systems so that all individuals experiencing homelessness are informed about both SOAR and IPS, and able to pursue income from one or both services, as best meets their needs

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Integration → Choice

When programs began offering assessments for both SOAR and IPS models with program participants, almost 75 percent of participants chose to enroll in both services

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Future Integration Efforts

- Develop clear procedures for communication and referrals between SOAR and IPS teams
- Implement a routine case conferencing system
 - The sites who had the strongest outcomes reported developing close collaborations between SOAR and IPS teams
- Increase opportunities for program participants to meet with both programs at intake

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Strategies to Remember

- Encourage work from the start
- Connect with work support programs
- Integrate services whenever possible
- Utilize Social Security work incentives

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Work Incentives: Resources

The Red Book- A Guide to Work Incentives

<https://www.ssa.gov/redbook/>


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A Brief Overview of Work Incentives

<https://soarworks.samhsa.gov/article/brief-overview-work-incentives>



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Employment Resource: Custom Handouts/Cards

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Resources located in the Leader's Only Section

SAMHSA
Substance Abuse and Mental Health Services Administration

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SOAR for Adults: Leadership Academy

SOAR and Special Populations

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SAMHSA
Substance Abuse and Mental Health Services Administration

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Engaging Special Populations

- Be aware of cultural sensitivities; life experiences may impact the type of engagement needed
- Seek funding for specific service of special populations
 - Consider how the SOAR model and SSI/SSDI benefits acquisition can positively impact this population you are targeting
- Use SAMHSA SOAR TA Center resources (issue briefs, webinars)
- Engage the SAMHSA SOAR TA Center's subject matter experts

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SAMHSA
Substance Abuse and Mental Health Services Administration

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Special Populations

- Veterans
- Children and Youth
- Persons Involved in the Legal System
- Rural Communities
- American Indians and Alaska Natives
- Immigrants

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SAMHSA
Substance Abuse and Mental Health Services Administration

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SOAR for Adults: Leadership Academy

Veterans

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Importance of SSI/SSDI for Veterans

- SSA disability benefits can provide access to:
 - Income: Veterans can receive SSI/SSDI in conjunction with, or as an alternative to, VA disability benefits
 - Health insurance: Veterans can use the Medicaid and Medicare health benefits that come with SSI/SSDI to supplement VA health services
- For Veterans with disabilities, SSI/SSDI can increase income and housing stability, and reduce their future risk of homelessness
- Opportunity for staff serving Veterans to help with both SSA and VA disability benefits

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Veterans and SSA Benefits

- The definition of disability and application process is different for VA and SSA benefits.
 - Discharge status is not a factor in SSI/SSDI determination
 - Disabling condition does not need to be related to military service
 - There is no partial disability with Social Security
 - Those denied for VA benefits may still be eligible for SSI/SSDI
 - Veterans can access SSA benefits while they are waiting for VA benefits

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VHA Memorandum on SOAR

- New memo released in May 2017 to update the 2013 VA memo on SOAR
- Applies to federal VA staff and reaffirms the importance of SOAR to VA Homeless Programs
- Each VA Medical Center will assess their capacity to provide SOAR assistance to Veterans and collaborate with community providers
- Staff are encouraged to participate in SOAR training and fully assist with SSI/SSDI applications, including acting as the SSA-1696 Appointed Representative (new!)
 - May not serve as Representative Payee (SSA-11)
 - <https://soarworks.samhsa.gov/article/va-staff-appointed-representatives>

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SSA Fast Track Programs: Veterans

- 100% Permanent and Total Veterans Initiative
- Expedites SSI/SSDI applications from Veterans who have 100% P&T rating from the VA
- Does not guarantee SSI/SSDI approval
- Wounded Warriors
- Veterans who received disabling mental or physical health injuries while on active duty on or after October 1, 2001
- The injury does not need to have occurred during combat operations.

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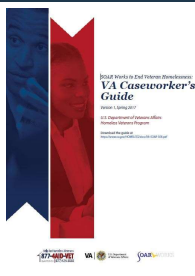
VA Guidance on SOAR

VHA Homeless Programs Office released guidance (updated May 2017):

SOAR Works to End Veteran Homelessness: VA Caseworker's Guide

- Step-by-step guide on using SOAR after completing the SOAR Online Course
- Crosswalk of where to find key information for SSI/SSDI in VHA assessments
- Full of tips on how to efficiently complete applications using the SOAR model

<https://www.va.gov/HOMELESS/docs/VA-SOAR-508.pdf>



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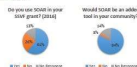
VA Guidance on SOAR: SSVF

In July 2017* the VA released the Supportive Services for Veteran Families: SOAR Integration Toolkit. **Updated in 2019*

- Over 20 pages of comprehensive guidance for SOAR implementation, including:
 - Using SOAR in community planning efforts, estimating the need for dedicated SOAR benefits specialists, subcontracting with local agencies, and more!

Integration of SOAR into SSVF Programs
SOAR grantees are critical to providing and ending homelessness for veteran families. They are able to provide veteran families with the services, housing-focused interventions such as linkage to mainstream resources and income supports that promote housing stability.

In a December 2018 survey, more than 60 percent of SOAR grantees reported using the SOAR model to assist veteran families who are housed directly through SOAR and through non-SOAR-funded providers, or in helping veterans to community SOAR partners. However, 44 percent of grantees reported that the SOAR model would be an added tool in their communities.



*This guide provides resources:

- ✓ identify and describe how veterans with disabling conditions can benefit from SOAR
- ✓ help incorporating SOAR best practices across SOAR grants
- ✓ incorporate SOAR into community planning efforts
- ✓ define the local need for SOAR services
- ✓ establish a plan and coordinate with community partners to meet service needs

https://www.va.gov/HOMELESS/ssvf/docs/SOAR_SSVF_Toolkit.pdf

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Assisting Applicants Involved in the Legal System

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Persons Involved in the Legal System

- A person can apply for benefits while incarcerated
- Prior history of incarceration alone does not make someone (in)eligible for benefits
- Warrants (other than escape) should not hinder a person from applying or receiving payment

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Pre-Release Applications

- New applications can be made prior to release
- The general rule is 30 days prior to the expected release date
- Pre-release agreements between SSA and the institution can be extended to as many as 120 days prior to release

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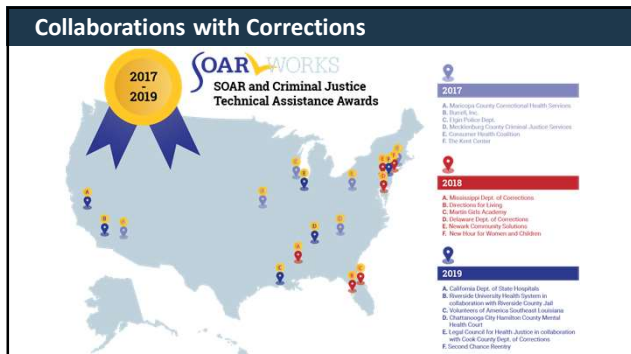
Engagement Tips for People in Correctional Settings

- Jails and prisons have distinct cultures
- Anticipate how this culture or “code” affects behavior and functioning in prison
- Expand skills to engage individuals in this culture
- Life experience affects engagement
- Engagement involves creating a safe space

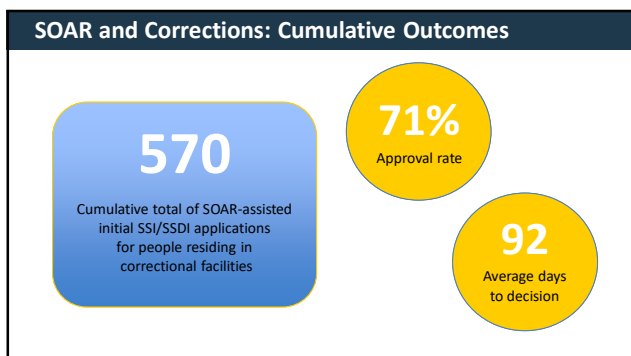
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Youth and Young Adults

- Youth and young adults ages 18-24
- Due to a lack of extensive work history, other sources are important:
 - School records
 - Collateral sources
 - Comparison to average youth (developmental and decision making abilities)
- Age 18 Redetermination
 - Young adults who were eligible for SSI as a child will be evaluated to determine if they qualify under the adult definition of disability
- Youth aging out of foster care
 - Foster youth of any age are able to apply for SSI up to 6 months (180 days) prior to leaving care.

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SSA's Definition of Disability for Child SSI

- A medically determinable physical or mental impairment, which results in marked and extreme functional limitations and which can be expected to result in death or which has lasted for a continuous period of not less than 12 months
- How do the child's functional abilities compare to those of a child of the same age who does not have the physical and/or mental impairments?
- Six Domains:

1) Attending and completing tasks	4) Moving about/manipulating objects
2) Acquiring and using information	5) Caring for yourself
3) Interacting and relating with others	6) Health and physical well-being

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Child SSI - Other Considerations

1. Income/Resources: Parent/household income/resources
2. Citizenship/Immigration status
3. Separate forms and questionnaires for specific age groups
4. Sources of medical and educational information:
 - **A Criteria:** licensed physicians, school psychologists, physical, occupational and rehabilitation therapists, qualified speech-language pathologists
 - **B Criteria:** parents, caregivers, neighbors, friends, educational personnel, daycare providers, babysitters, psychiatric social workers

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Strategies for Engaging Child Providers

- Identify children and youth counterparts with existing stakeholders
 - Ask them for their contacts in each specialty area
- Organize a SOAR for Children Orientation
 - Assess current need and capacity
- Schedule a separate meeting with SSA/DDS to discuss the SOAR process for child SSI claims
- Include youth and parents on your steering committee

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Getting Involved in Child SSI Applications

Identify the SOAR Intersect Where You Can Enhance the Process!

Identify Applicant	Streamline the Interview Process	Mean-Driven Evaluations & Recommendations on MSF	Monitor the Case Support	Support Interviewer and Recovery
<ul style="list-style-type: none"> Identify high-risk, complex, and/or difficult cases Identify high-risk cases Identify complex cases Identify cases with complex support needs, broadened service area 	<ul style="list-style-type: none"> Identify cases, primarily based on the following criteria: Greater Child Contact Greater need for emotional assistance White American presented Case with an adult with the legal guardianship Case with a child with a SOAR (Child Care, SIA, and CDS) 	<ul style="list-style-type: none"> Targeted, adult psychological services Identify cases, primarily based on the following criteria: Greater Child Contact Greater need for emotional assistance White American presented Case with an adult with the legal guardianship Case with a child with a SOAR (Child Care, SIA, and CDS) 	<ul style="list-style-type: none"> Address cases, primarily based on the following criteria: Greater Child Contact Greater need for emotional assistance White American presented Case with an adult with the legal guardianship Case with a child with a SOAR (Child Care, SIA, and CDS) 	<ul style="list-style-type: none"> Greater need for emotional assistance Greater need for emotional assistance Greater need for emotional assistance Greater need for emotional assistance Greater need for emotional assistance

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Rural Communities

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SOAR in Rural Communities

- Homelessness often “looks” different
 - People may live doubled up, reside with extended family, or live in remote areas.
- Common challenges of homelessness:
 - High rates of poverty
 - Lack of resources, services or infrastructure
 - Limited affordable housing
- Tips for SOAR case managers:
 - Collect as much information as possible at the first meeting
 - Use the telephone or Skype to communicate with your applicant
 - Ensure that there is a reliable third party source
 - Utilize telemedicine

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American Indians and Alaska Natives



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American Indians and Alaska Natives (AIAN)

- SSI and SSDI can be a crucial source of income for AIAN whether residing on or off a reservation
- There are exceptions for some income and resources
- Other SSA Resources:
 - Video Service Delivery locations
 - Tribal Consultation & Coordinated Plan
 - Ticket to Work & Tribal Employment Networks

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Custom Tools for Native Communities

- The SAMHSA SOAR TA Center is committed to assisting with SOAR expansion in Native communities
- Custom tools and resources are available

Medical Summary Report Interview Guide and Template for American Indian and Alaska Native Communities

This document provides a comprehensive guide for conducting interviews for medical summary reports. It includes a detailed template for the report, which covers sections such as: Personal Information, Medical History, Current Health Status, and Social History. The guide also includes instructions on how to use the template and how to conduct the interview.

SOARWORKS: SSI/SSI Outreach, Access, and Recovery for American Indian and Alaska Native Communities

This document provides a comprehensive guide for conducting interviews for medical summary reports. It includes a detailed template for the report, which covers sections such as: Personal Information, Medical History, Current Health Status, and Social History. The guide also includes instructions on how to use the template and how to conduct the interview.

181 <https://soarworks.samhsa.gov/topics/american-indians-alaska-natives> **SAMHSA**

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Immigrants/Non-Citizens

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SSI Eligibility for Non-Citizens

- Eligibility
 - 9 classifications
 - SSI for Non-Citizens: <https://www.ssa.gov/pubs/EN-05-11051.pdf>
- Cultural competence and engagement:
 - SAMHSA TIP 59: <https://store.samhsa.gov/product/TIP-59-Improving-Cultural-Competence/SMA15-4849>
- Resources
 - SOARWorks: <https://soarworks.samhsa.gov/topics/immigration>
 - SSA: <https://www.ssa.gov/people/immigrants/>
 - National Immigration Law Center: <https://www.nilc.org/issues/economic-support/overview-immigrantprograms/>

Supplemental Security Income (SSI) For Non-Citizens

This document provides a comprehensive guide for conducting interviews for medical summary reports. It includes a detailed template for the report, which covers sections such as: Personal Information, Medical History, Current Health Status, and Social History. The guide also includes instructions on how to use the template and how to conduct the interview.

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Spanish Language

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Spanish Language Services

- SSA: <https://www.ssa.gov/espanol/>
- Other Languages: <https://www.ssa.gov/site/languages/en/>
- Is there a resource you would like to see translated into Spanish? Let your SOAR Liaison know!

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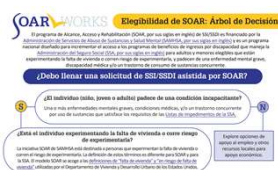
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Spanish Translations

<https://soarworks.samhsa.gov/article/spanish-translations>

- Alcance, Acceso y Rehabilitación de SSI/SSDI: una Descripción General (SSI/SSDI Outreach, Access, and Recovery: An Overview)
- Elegibilidad de SOAR: Árbol de Decisión (SOAR Eligibility: Decision Tree)
- Si, Usted Puede Trabajar (Yes, You Can Work)
- Pasos para llenar una solicitud de SSI/SSDI usando el modelo SOAR (Steps to Completing an SSI/SSDI Application Using the SOAR Model)
- Identificación de los solicitantes de SOAR (Identifying SOAR Applicants)
- SSI para niños (SSI for Children: Information Sheets)



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Small Group Breakout

Piquing SOAR Interest

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Yay! And Hmmm?

What is something that excited you today?

What do you still have questions about?

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Welcome to Day 3!

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Making SOAR Happen:
Creating Effective Meetings

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Creating Effective Meetings

Before	During	Ending	Follow Up
<ul style="list-style-type: none"> Identify the meeting purpose and the desired outcome (<i>By the end of this meeting, I want the group to...</i>) When setting agenda items, identify the action to be taken and assign an appropriate leader with a time limit Establish comfortable meeting environment 	<ul style="list-style-type: none"> Start on time and keep the group on track Set or review ground rules, as appropriate Review past minutes and assigned tasks Record key decisions and action items Encourage everyone's participation 	<ul style="list-style-type: none"> Clarify next steps Confirm action items, person responsible, and due dates Set the next meeting Evaluate the meeting process (what went well, what to do differently) Thank the group and end on time 	<ul style="list-style-type: none"> Send out meeting minutes <i>soon</i> afterwards, including action items and responsibilities Check in with those responsible for action items to keep the process moving

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Creating and Leading a State or Local Steering Committee: SOAR in Your Community

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Your SOAR Steering Committee

Guides SOAR
within Your
Community



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SOAR Needs State and Local Steering Committees

State Steering Committee

- Implements SOAR statewide
- Supports local SOAR leadership
- Resolves challenges

Local Steering Committee

- Works closely with the CoC
- Supports local benefits specialists
- Resolves local challenges or brings them to the state steering group

Both

- Meet regularly
- Collaborate with SSA and DDS
- Discuss and resolve challenges
- Monitor quality of applications
- Track outcomes
- Identify areas for SOAR expansion
- Explore strategies for ongoing funding and sustainability

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Who Should Be at the Table?

Health and Behavioral Health	Homelessness and Housing	Special Populations	Key Stakeholders	Criminal Justice Agencies	Community Members
State/county behavioral health agencies	Homeless service providers	Agencies serving Veterans (e.g. SSVF)	Social Security Administration	Agencies serving reentry populations	City/county planners and office of economic development
Mental health/substance use centers and clinics	Case management organizations	Agencies serving American Indian/ Alaska Natives	Disability Determination Services	Jail and prison officials	Colleges and Universities
Hospital ER/Crisis Centers	Housing First organizations	Agencies serving youth in transition	Persons with lived experience	Probation and parole departments	Funders, local businesses
Hospital social work supervisors	Housing authority	Veterans Affairs: Medical Centers, HUD-VASH	Medicare/Medicaid offices	Diversion programs	Faith-based organizations
Peer Support Agencies	CoC providers and representatives	Supported employment services	Vocational Rehabilitation	Specialty Courts	Elected officials/ dignitaries
Community health centers (FQHCs/HCH)	Benefits planners, representative payees	AmeriCorps State and VISTA members	Human Services departments	Sheriff/police (specialty teams)	Local newspaper
Medical records staff	Case managers with SOAR or SSI/SSDI experience	Legal Aid/Pro-bono attorneys	Mental Health Associations (MHAs)	Facility clinical/ medical director	NAMI or other consumer organizations

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Successful Steering Committees

- Led by someone who keeps the group on task and moving forward
- Provide members an opportunity to share experiences, information, and resources
- Offer opportunities for authentic input from people with lived experience
- Promote a workable plan to address barriers
- Monitor quality of applications submitted
- Track outcomes of applications
- Explore ways to successfully sustain and expand SOAR

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SOAR Tool: Steering Committee Tools Packet



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How To Use A Steering Committee

- Discuss challenges and address barriers
- Invite open discussion among stakeholders and SOAR case managers
- Celebrate successes
- Create sub-committees
- Invite guest speakers (SSA, DDS, Medicaid, SAMHSA SOAR TA Center)
- Follow-up with meeting minutes and next steps

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Successful Model: Local CoC

- New York City Coalition on the Continuum of Care
- Invited CoC members and others to SOAR planning forum
- Held a SOAR Stakeholder Summit to gain buy-in from key people in the community
- Meets monthly
 - Includes guest speakers (DDS, SSA, SOAR TA Center)
 - Updates and reviews the SOAR action plan
 - Reviews pieces of the curriculum
 - Shares successes and addresses barriers

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Successful Model: State

- Maryland State SOAR Workgroup led by PATH-funded State SOAR Director
- State SOAR Director played an integral role in expanding SOAR to every county in the state by:
 - creating local SOAR steering committees and strategic plans, and
 - developing dedicated SOAR specialist positions
- Director facilitates quarterly state SOAR Workgroup meeting (in-person and by phone)
 - Representatives from SSA, DDS, each county, and SAMHSA SOAR TA Center are present
 - Review the annual state SOAR plan, each county's outcomes, upcoming trainings, the SOAR process, and any barriers

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SOAR and Coordinated Entry

"I am most proud of implementing SOAR into our coordinated entry system. We have amazing collaborations with our local health care and housing service providers to be able to develop a formalized SOAR system. We are working to connect the most vulnerable individuals experiencing homelessness in our community to benefits as quickly and efficiently as possible."

– **Niki Kozak**, SOAR Local Lead, Austin, TX

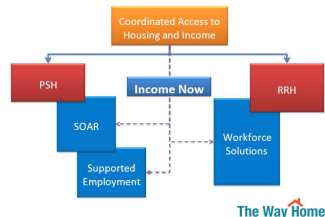
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Coordinated Entry in Houston, Texas


- Applicant presents at a coordinated entry HUB.
- If the applicant meets the eligibility criteria *Income Now* matches them directly with a SOAR-trained case manager.
- The applicant may also be involved in supported employment or search for mainstream competitive employment.



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Activity

Problem, Root Cause, Solution



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SOAR Outcomes Tracking

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Online Application Tracking (OAT)

- A web-based program that allows case managers to keep track of their outcomes
 - Free
 - Easy to use
 - Accessible from any web browser
 - Nothing to download
- On a secure server
- HIPAA compliant
 - No personal identifying information is collected


<https://soartrack.samhsa.gov>

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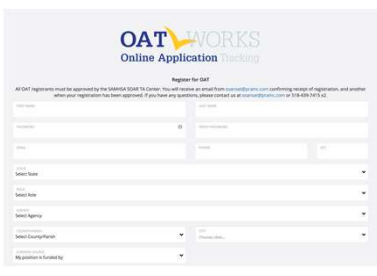
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OAT Registration

Track outcomes and get funding!




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Outcomes in OAT


- Outcomes for initial applications and appeals
 - Approval rates
 - Time to decision
 - Critical components
- Optional outcomes
 - Housing
 - Employment
 - Medicaid and other public benefit reimbursements



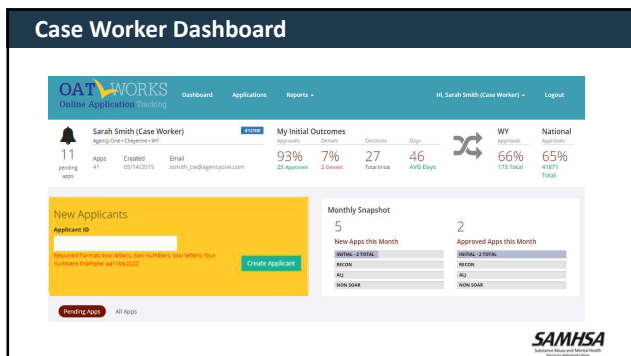
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Applicant Identification (ID)

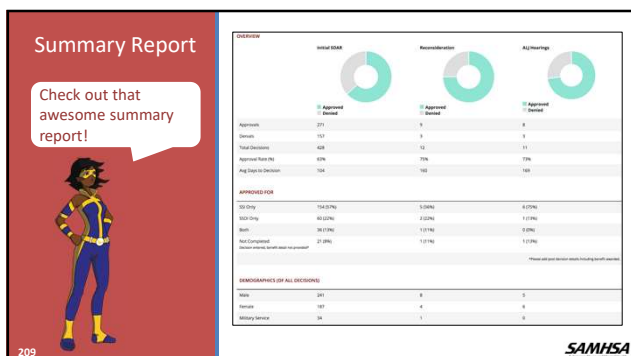
- No personally identifiable information
- Alpha-numeric ID
 - 2 letters
 - 2 numbers
 - 2 letters
 - 4 numbers
 - Example: AA11BB2222
- Case workers should record Applicant ID in the case file for cross reference!



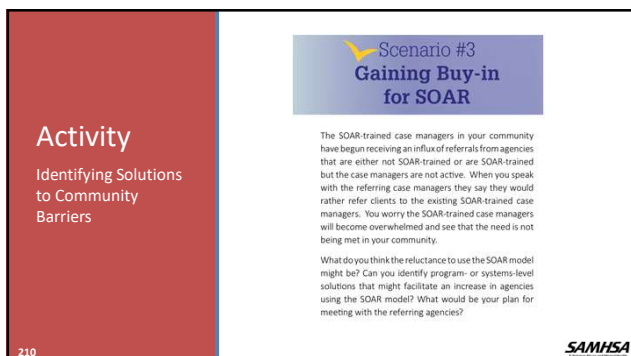
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Small Group Breakouts

Building Your SOAR Toolbox

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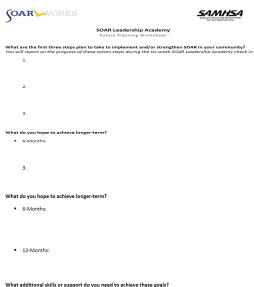
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Activity

Presenting Your Action Steps

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Wrap up and Evaluation


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Evaluation

Thank you!



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- We value your feedback!
- Evaluation helps us to improve future Leadership Academies!
- Important for future funding!

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Connect With Us!



Your State Team Lead

Your SOAR TA Center Liaison

soar@prainc.com

<https://soarworks.samhsa.gov>

<https://www.facebook.com/samhsa>

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